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ABSTRACT

This paper discusses a role group sharing meeting held July 30-31, 1979 in Windsor, Connecticut, and attended by documentors and evaluators. Examined, in documentation form, are issues and learnings from the sharing meeting and an analysis of the design of the meeting, which was a pilot for other network role group meetings anticipated during the next year. A copy of the agenda is reproduced together with an evaluation of the meeting. (Author/LD)

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DOCUMENTOR/EVALUATOR ROLE GROUP SHARING MEETING

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Rhode Island State College

Sara Massey, Executive Secretary

August 8, 1979

EA 012 238

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INTRODUCTION

The Documentor/Evaluators Role Group Meeting was held July 30-31, 1979 at the Sheraton Tobacco Valley Inn in Windsor, CT. The purposes of this meeting were:

1. To share among participants, documention and evaluation strategies and procedures used during the last year.

2. To obtain current information from SRI International on documentation desired next year for Program '78 and '79.

3. To discuss plans for project evaluations.

4. To explore documentors role in demonstration, validation, and dissemination.

The meeting was attended by six '78 documentors and evaluators, four '79 documentors and evaluators, three '78 directors, three '79 directors, and four others.

The following documentation presents 1) issues and learnings from the sharing meeting; and 2) an analysis of the design of the meeting which was a pilot for other Network role group meetings anticipated during next year. The issues section should prove useful for directors and documentors as they design next year's documention plan. This section might also be useful as data for others planning training in documentation.

THE SUBSTANCE OF THE SHARING

I. THE QUESTIONS:

Throughout the process of sharing, discussing, obtaining information and exploring roles it became apparent there were many issues and problems that needed further clarification or suggested solutions. Because projects are site specific, and the time budget allocation for documentor/evaluator are so diverse, many of these issues and problems must be resolved at the project level.

Some of the questions that were raised around which much discussion took place and sub-issues emerged are the following:

1. What are the purposes to be served by documentation/evaluation?

2. Who determines what process is used to determine the purposes of the documentation/evaluation?

3. Who are the audiences for documentation/evaluation?

4. Once purposes of documentation and evaluation are arrived at, how should the decision about the design of the documentation and/or evaluation plan be made?

5. Are there distinctive functions of documentation and evaluation which lead to a separation between the two or are they the same function?

6. Who should be involved in the implementation of the documentation plan?

7. What is important to document?

8. What are some specific ways to collect data about the project?

9. How should collected data be organized so that it is useful?

Some sub-issues or overlapping questions that emerged as a result of exploring the previous questions included the following:

1) There must be a clarification of management issues and process issues. Questions of purpose and overall design of documentation/evaluation is a management issue which must be resolved by the director and/or governance system of the project with the input of the documentor/evaluator.

2) Reporting information to various audiences leads to fragmentation rather than an integration of the documentation process. Without some system of integration of the documentation process, responses to SRI, national Teacher Corps, other contractors and the project causes a severe time burden on the staff.

3) The designated documentor needs the assistance and cooperation of various project participants and staff members. It is often difficult to obtain this cooperation either because the responsibility is perceived to be the documentor's alone, or because the participants don't know how to document.

4) Any evaluation of project staff by the documentor is a source of potential conflict that may reduce the full cooperation of staff in documentation.

5) How should documentors deal with sensitive issues? Should the director be given all information? Should the information be put into written form?

6) Too much information can be useless. Any information collected should be useful for a specific purpose(s).

7) Can or should documentor/evaluator be objective? Should the documentor be outside the project? Should the evaluator?

8) Should student learning be evaluated?

9) How can changes in school climate be measured?

10) How does one relate documentation to project objectives?

11) How does one handle unexpected events? When the purposes

and the design of documentation are determined in advance some way of dealing with those developments which were not anticipated must be built in.

12) Are logs or diaries useful as a documentation mechanism?

13) How much editorializing should be done by the documentor? the evaluator? the documentor/evaluator?

II. THE LEARNINGS

As the participants dealt with the questions, issues and problems described in above suggestions, information, and various degrees of agreement were reached. This section describes some of the learnings which resulted from this sharing.

1 The Director and Documentor/Evaluator's Relationship

There was general agreement that the purposes of documentation/evaluation, the overall design, the audiences for reports, and the amount of direct involvement of other staff members are primarily management issues that must be determined or approved by the director. The documentor/evaluator should work closely with the director in providing information to the director in the planning and implementation of the design. Many problems can be avoided if there is a delineation between management and process issues and if the director and documentor/evaluator communicate effectively.

2) Asking Probing Questions about which to gather information on the project helps to organize the collected data so that it can be related to objectives and reports. Collecting data without these questions in mind leads to much data and information which is unusable and/or unnecessary.

3) Unanticipated Events

Documentation plans need a mechanism for identifying and describing unanticipated events, some of which may form trends which may be included as a focus for documentation later.

4) Involving Others in the Documentation Process

"One person simply cannct document all that needs to be documented. Project participants and staff in particular need to be trained to document and specific structured forms for documentation designed." M. Arbuckle

5) Interviewing is a very valuable documentation device.

6) Logs of staff members can be valuable.

But there are problems about getting people to submit these because they are time consuming, open ended, unorganized, and frequently illegible. It may be too much to expect project participants who are not staff members to do this.

7) What should be documented? A partial list of possibilities.

Self contained small reports.
Needs assessments/Processes used
Meeting minutes and agendas
Newspaper accounts of events
Log of press conferences and topics
Reports from meetings and conferences
Community training activities
Inservice program
Relevant meetings such as school committees
Director's log

8) What are some effective mechanisms for gathering data?
A partial list of possibilities.

Interviews
Logs or diaries
Status reports
Slides, photos, movies
Mapping to access interaction patterns
Videotaping
"Quick and Dirty" information (one word reactions to meetings, line faces)
Questionaires

9) The documentation commitment for the national assessment.

SRI will be requesting essays periodically from all 130 projects. These essays are linked to objectives and programatic components in the Rules and Regulations of Teacher Corps. This piece of the national study is called the Implementation Impact Study. Other information including demographic information will be requested by other study groups which are part of the National Assessment.

30 projects will be selected as a core sample for a more detailed study. Of these 10 will be selected for in depth case studies. Projects selected for this additional analysis will be contacted shortly.

The audiences for these studies are Congress, Teacher Corps Washington and other planners.

In September or October documentors will be provided information at a conference about the final SRI plans for utilizing local documentors' reports. It was suggested that information about this meeting and the SRI plans be given to local projects as soon as possible.

There was a strong plea for integrating documentation so that data collecting for SRI and other reports would not be fragmented.

10) A definition of documentation

There appeared to be consensus agreement that documentation can be defined as "the process of recording policies, processes, and products utilized in the attempt to attain the objectives of the project as stated in the proposal."

11) Primary focus of documentation

There appeared to be consensus agreement that the first concern of documentation should be how it can serve the project, then, how that information can be used by others. There seems to have been an over emphasis on documentation solely for the purposes of SRI International.

12) Documentation, demonstration and validation

The development of various products and processes is one focus for documentation looking ahead to demonstration and validation. What were the steps by which something demonstrable came about? In the validation of a demonstrable process, there should be enough information about the development so that others may be able to replicate or adapt the process to achieve similar results plus solid evidence of its success.

III. TRAINING AND SHARING FOR DOCUMENTORS/EVALUATORS

1) Most participants agreed that the sharing was valuable and that more sharing should be planned for the year. It was suggested that the network serve as a clearing-house for the sharing of resources, forms, reports and written ideas.

2) There was a suggestion that individual documentors, through the directors, could arrange for an exchange of visits between projects.

3) There was a request for more network role group sharing for documentors/evaluators.

4) There seemed to be support among documentors to attend as a group the up and coming Lesley College Conference of the Evaluation Center if the topic was relevant.

IV. BOOKS TO HUNT FOR

The following books were mentioned as valuable resources during the two day meeting. They are listed here as REMINDERS to send book or information to Network so they can be studied for possible dissemination to documentors.

Hunters of the Northern Ice (D. Beers)
The Mountain People
Five Families, Oscar Lewis
Handbook on Documentation, Brenda Engels, North Dakota Study Group (G. Hein)
Handbook on Desegregation, Castle, National Institute of Education (G. Hein)
The Green Jobbie thats' out of print - (H. Thompson)
Blue Collar Aristocrats (H. McEntee)
"Quick and Dirties" National Drug Abuse Training Center (C. Thomashow)

V. OBSERVATIONS IN CLOSING

There were many other issues discussed during which the participants made no attempt to reach closure. In other cases the participants had divergent opinions about the nature of the issue and the possible solutions to the problem. Some of these differences can be attributed to the site specific differences in the project, including the management system in the project, the job description of documentor and/or evaluator, and specific proposal objectives. Other differences were philosophical ones involving the nature of the role.

The participants did agree that the important organizing questions developed during the Role Group Meeting would be helpful in the planning in their individual projects.

AN ORGANIZER FOR DOCUMENTATION

PART I: Who wants	What information gathered	in what Form?
Eg #1 SRI	What were the unanticipated events?	essay
Eg #2 TC/W	What were the outcomes of planning?	report
Eg #3 Director	What are the reoccuring issues?	oral report

PART II: Who will gather	that Information	in what Way	from Whom?
Eg #1 SRI (continued) Documentor	Unanticipated events	interviews	director, community coordinator, etc.
Eg #2 TC/W (continued) Documentor	Inservice program	schedules	program specialist assistant director
Eg #3 Director (continued) Documentor	Reoccuring issues	minutes of meetings	meeting chairpersons

THE DESIGN OF THE MEETING

This meeting was a pilot effort to gather information for making decisions about the design of a series of role group meetings anticipated in the 1979-1980 Network Contract. The following features were a part of this meeting:

1. The Board of Directors determined the general purposes of the meeting.

2. No data about role group needs was collected from anticipated participants.

3. There was no planning meeting to design the two-day meeting.

4. The executive secretary functioned as facilitator for the meeting.

5. There were no "expert presentations" beyond the informaion provided by SRI International.

6. The Network's documentation of the meeting was to identify issues and concerns for local project resolution rather than an overall content description of the meeting.

The implications of the piloted features, if successful, would be to reduce the cost of role group meetings by $700 - $1000. which is normally spent for planning meetings and consultants, to reduce the time of director's and executive secretary spent in planning sessions, and to develop a meeting format that could be delivered in less than three weeks.

In an effort to anticipate problems the following dimensions were incorporated in the meeting design:

Problem #1 Lack of meeting ownership by participants.

Design Solution:

a) Input was solicited from participants shortly after meeting began to obtain suggested changes and modifications in the agenda.
b) The agenda structure designated time blocks for meeting purposes with session structure deliberately vague to accommodate participant suggestions.
c) The environment created was informal and intimate which would make it easy for participants to contribute. This environment in part was created through a series of short, quick human relation activities which occurred throughout the workshop.

Problem #2 Not meeting needs of participants.

a) The facilitator would be flexible and not rigidly tied to agenda topics in order to better accommodate the specific needs of participants.
b) The facilitator would accept participant suggestions that had general group consensus and be sure they happened before meeting concluded.

Problem #3 Lack of substance or becoming a "war stories" meeting.

a) Specific documentors were contracted prior to meeting and asked to 1) bring specific examples of materials to be shared or 2) draft a short mini-presentation on a specific topic or 3) be prepared to be part of some ad hoc presentation.
b) Other participants were contacted prior to the meeting to request that they actively participate and give informal input around specific issues and tasks when they arose in the meeting or when appropriate.
c) The facilitator had structured lesson plans prepared to be used only as needed to obtain more substance in the meeting.
d) The facilitator was to actively support and encourage participants who had knowledge of an issue to go ahead and do a mini-presentation on topic.

Problem #4 There would not be enough sharing time regardless of how much time was spent sharing.

a) Participants would be encouraged to make one or two

site visits to other projects within the region and documentors would solicit others visiting in order to specifically respond more to local documentor needs.

b) To build into the meeting various opportunities for "unanswered questions", to make agenda adjustments in order to be sure each participant got something that they wanted.

Appendix B shows the agenda used going into the meeting and Appendix C shows the format of each session as it occurred at the meeting based on participant's input.

The compiled participant evaluations are included as Appendix D. The learnings which follow were gained from 1) the evaluations, 2) participant feedback to directors at sites and to executive secretary at end of meeting and 3) the facilitators past experience.

Learning #1 Meeting Purposes were not met, but meeting impact was high.

When the agenda is modified to respond to participant needs and input there will usually not be enough time to accommodate all purposes stated-in-advance which are still on the evaluation form. Purposes deleted during meeting should be noted to participants, and noted in the meeting report.

Learning #2 Skill is needed by the facilitator to maintain a balance in sharing and substantive input from the group.

The facilitator must be familiar enough with project activities and participant's work to be able to draw out examples and content within their experience at the appropriate time if its not readily forthcoming. Frequently participants don't see the connection between what they did and the topic being discussed.

Learning #3 The expertise of participants can be used and incorporated in an ad hoc basis during meetings with relative success.

If presentations are planned in advance they very often are stilted-formal, take substantial time, and include more than participants really wanted. The ad hoc arrangement keeps presentations focused on the topic being raised takes less time and facilitates more group interaction.

But the facilitator must "give permission" or somehow acknowledge to the "expert participant" that a mini presentation or 5 minute lecture is appropriate. (i.e.; "Sam, tell us what you did about that."

Learning #4 Structuring the session with a general theme or purpose was necessary. Any less structure would make a "sense of achievement" difficult to obtain.

In accepting input from the participants the primary purposes of the meeting must not be lost. Some purposes can usually be deleted or delayed, but rarely all of them or the meeting would never have been convened. The session themes provided a necessary basic organizer for the meeting.

A Repeat

Learning #5 Participants want to cover more areas than they are willing to give time to do.

Regardless of the agenda schedules or the value of the sessions participants leave before the final session. Various tactics have been tried to avoid this, but none have proved successful.

Learning #6 The anticipated problems did not emerge as problems during the meeting.

There was ownership by participants in the meeting, participant's needs were meet at an acceptable level, and participants perceived the meeting had impact.

IN CONCLUSION: AN EXTENSIVE PLANNING - INPUT MODEL DOES NOT SEEM NECESSARY FOR EFFECTIVE ROLE GROUP SHARING MEETINGS WITHIN THE NETWORK.

APPENDICES

A. Participants

B. Agenda Planned

C. Actual Agenda

D. Evaluation

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PARTICIPANT LIST

Allan Alson, Lesley College (Director), '79
Margaret Arbuckle, Greenville (Evaluator), 12th
David Beers, SRI International
John Bucci, Network Activity Documentor
Charles Budrose, Boston State College (Documentor), '78
Robert Drummond, University of Maine/Orono (Evaluator), '78
Jean Esposito, Worcester Public Schools (Director), '79
Lynn Griesemer, University of Rhode Island
Catherine Hawkes, Rhode Island College (Representative), '79
George Hein, Lesley College (Evaluator), '79
Beverly Kelton, University of Hartford (Director), '78
Gus LeBlanc, University of Maine/Orono (Interim Documentor), '78
Melvin Lynch, Northeastern (Evaluator), '78
Sara Massey, Network, Executive Secretary
Bill McCook, University of Connecticut (Documentor), '78
Harry McEntee, University of Vermont (Documentor/Evaluator), '78
Robert McLean, Northeastern (Documentor), '78
Irene Mehnert, University of Maine/Orono (Director), '78
Ron Pieciul, Boston State College (Team Leader), '78
Anne Rash, University of Connecticut (Team Leader), '78
Cindy Thomashow, Keene State College (Documentor), '79
Harry Thompson, University of Vermont (Director), '78
Ginny Trumbull, Keene State College (Director), '79
Tom Wolf, University of Hartford (Documentor), '78

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AGENDA

DOCUMENTORS/EVALUATORS ROLE GROUP MEETING

July 31 - August 1

Sheraton Tobacco Valley Inn
Windsor, CT

PURPOSE:

1. To share among participants, documention and evaluation strategies and procedures used during the last year.

2. To obtain current information from SRI International on documentation desired next year for Program '78 and '79.

3. To discuss plans for project evaluations.

4. To explore documentors role in terms of demonstration, validation, and dissemination.

TUESDAY, JULY 31st

9:30	Registration (just inside the door) and Coffee	Pineapple Room
10:00	Session I: Sharing	Pineapple Room
	A. Introductions	
	B. Reviewing Agenda for Changes and Modification	
	C. Determine Procedure for Sharing (Group Decision: 15 minute time limit)	
	D. Sharing	
12:00	Served Lunch	Pedlar Room
1:30	Session II: SRI International Plans for Next Year's Documentation David Beers 15 minute presentation on New Manual Question and Answers	Pineapple Room

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AGENDA
Documentors/Evaluators Role Group Meeting
Tuesday, July 31st Cont.

2:30	Coke Break	
2:45	Session II (Continued)	Pineapple Room
4:00	Hotel Check In/On Own	
5:30	Dinner in small groups in Restaurant (Order from the menu)	Dining Room
7:30	Session III: Evaluation Plans	Pineapple Room

A. Discussion of Plans

B. Listing of Issues

C. Small Group Discussion on Selected Issue(s)
(Group chooses issue)

8:30 Adjournment as desired

WEDNESDAY, AUGUST 1

8:00	Served Breakfast Buffet	Pedlar Room
9:00	Session IV: Role Functions	Pineapple Room

Does the documentor have a role in
demonstration
validation
dissemination???

11:30 Check out of Hotel
(Store luggage in coat room beyond lobby desk)

12:00	Served Lunch	Pedlar Room
1:00	Session V: Review and Synthesis	Pineapple Room

What have we done?
What did we learn?
What do we need to do next?
What probably won't work?

2:00 Adjournment

Network Documentor: John Bucci
Rhode Island College

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ACTUAL AGENDA

10:00 Session I: Sharing
12:00

A. Participants found a person born the same month as themselves, talked to each other about their role and project, and introduced each other.

B. Participants at 2 tables discussed the agenda and from suggestions two 2 person conversations on documentation in front of group occured:

1. Tom Wolf, '78 documentor and Margaret Arbuckle, 12th evaluator talked about perceptions, tasks, etc.

2. Irene Mehnert, '78 director and Harry McEntee, '78 documentor talked about a documentor's way of learning about the task of documenting.

C. Questions and responses occurred during conversations with total group.

1:30 Session II: SRI International Documentation
4:00 Plans for '79-'80

A. 25 minute presentation by D. Beers.

B. Open questioning with responses by Beers.

C. Listing Orchids and Onions (Goods & Bads) about documentors role.

D. Questioning by Beers with responses from the group.

E. Each participant listed on paper 6 questions they wanted answered.

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ACTUAL AGENDA CONT.

7:30 Session III: Evaluation
9:00

A. Rotating Partners with an open ended question to respond to with each partner (6 times).

.Most interesting documentation strategy you've tried.

.In your role as documentor something you really don't want to do.

.A documentation strategy you tried that failed.

.Something you really want to do in documentation this year.

.Etc.

B. 30 minute presentation by Margaret Arbuckle on how her role of evaluator changed and the report formats and focus.

C. Network documentor reported questions wanted answered which determined next day's structure.

DAY TWO

9:00 Session IV: Role Functions
12:00 (Session Topic Changed)

A. Three person panel: Charles Budrose, '78 documentor; Lynn Griesemer, '78 director; Bill McCook, '78 documentor.

.What did you document?

.What data did you collect that you didn't need?

.How would you document the 1st year now?

.What did you do on school climate?

.Who got what information? How many copies of reports made?

ACTUAL AGENDA CONT.
Session IV: Role Functions

B. Questions from group occurred during panel.

C. Summary statements emerging from discussion were charted.

D. Materials distributed by McCook and Rudrose with summary statements.

E. Total group moved to one table for discussion:

.other creative ideas for documentation;

.resources knew about;

.future linking of documentors;

.very short overview of validation and JDRP.

F. Around-the-room sentence completion on "My response to this meeting."

G. Summary report by Network documentor on questions that didn't get answered.

H. Meeting evaluations completed.

1:00 Session V: Synthesis

(Meeting adjourned after lunch with closure being reached in F, G, H above.)

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ASSESSMENT

DOCUMENTORS/EVALUATORS' ROLE GROUP MEETING

CHECK: 16 of 19

1) 1 12th 8 '78 7 '79

2) 7 Documentor 4 Director

4 Evaluator 1 Team Leader

____ Other

3) Project Represented is _____

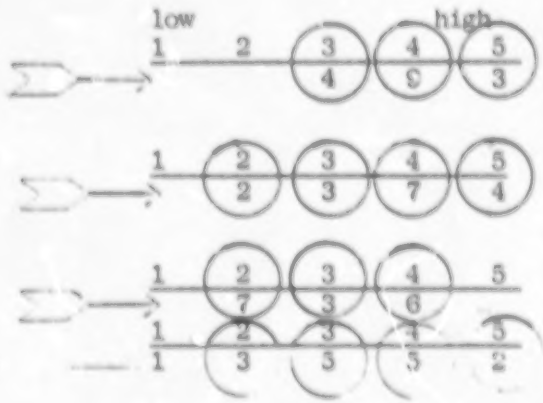
I. TO WHAT DEGREE WERE THE MEETING PURPOSES ACHIEVED:

a. To share among participants, documention and evaluation strategies and procedures used during the last year.

b. To obtain current information from SRI International on documentation desired next year for Program '78 and '79.

c. To discuss plans for project evaluation.

d. To explore documentors role in terms of demonstration, validation, and dissemination.

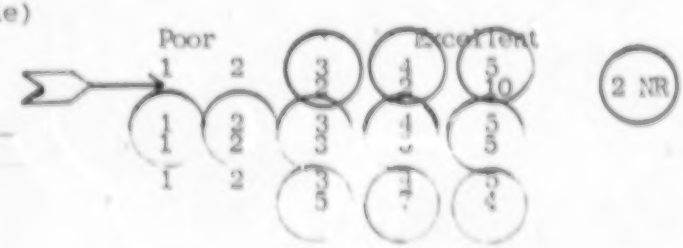


II. FACILITIES RATING (circle)

a) Sleeping Room

b) Location

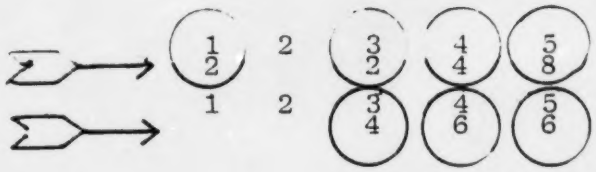
c) Meeting Space



ASSESSMENT
DOCUMENTORS/EVALUATORS ROLE GROUP MEETING
CONT.

d) Food

e) Time Schedule



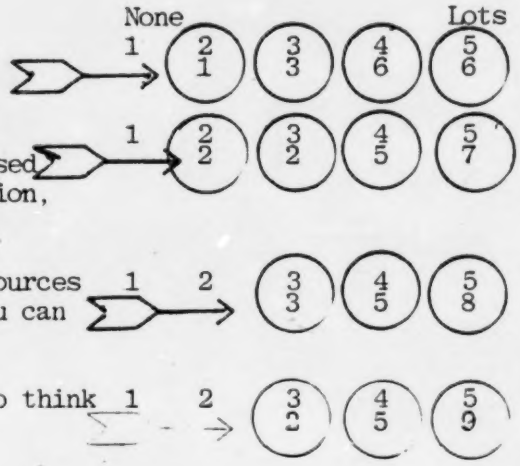
III. IMPACT (circle)

a) How useful will this meeting be in your work back home?

b) Do you have a better understanding of concepts addressed (ie, documentation, evaluation, etc.)?

c) Were you able to locate resources (people, materials) that you can use or connect with?

d) Did you get any new ideas to think about?



IV.

STRENGTHS	WEAKNESSES
.interesting to hear others perceptions .brought to mind questions that needed to be asked and answered .people and resources .small group and good interaction .good facilitation of discussion and sharing .highly professional attitude and comments by all involved .excellent sharing .having SRI present .flexible schedule .open, honest, friendly people .Sara - dynamic and on task leader and willing to be flexible to meet needs of group	.bibliographies and resources before meeting would have been helpful .took frustration of first morning to clarify needs/wants .time constraints .none .not enough practical in put about what has been found to be valuable to document .too little agenda to fill time .evaluation and long term role not addressed - at this point it may not be important .need more on nuts and bolts methods

STRENGTHS	WEAKNESSES
.2nd morning sharing .reverse sequence sharing at beginning .clariety on national evaluation (frightening) .meeting Network participants - very strong .sharing on types and ways of documentation .the many views of documentor's role .knowledge and skills of participants .willingness to share .Sara's ability to clarify, question and move things along at comfortable and manageable pace	